Selling a Membership in AMS

- 1. Log in to Agile Ticketing Solutions with your username and password. If you haven't received your user credentials, please contact your system administrator to set up your username and password.
- 2. Make sure that you are cashed in before starting sales for the day.
- 3. Click on the "Customer" icon to search for a customer account.



4. Search to see if they already have a customer record. You can search by Last Name, Email address, or Customer Number to see if their customer record is already on file. A list of customer records will appear if they are already in the system. Double click on their customer record if their name appears in the list.

ast Name	agle	City:			Member 2	t I			
inst Name:		State:		*	Members	No T	*		
hone		Zø				1	Exact Name Match		
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Agle	Overy	23636	4124 Central			TN .	37076		
elge	Christy	23637	4124 Central	Hernit		IN.	30076		
Aple	H.	23722	4124 Central			IN	37076	_	_
Agle	Mary	23640	4124 Central	Here	and the second se	IN IN	37076		-
Agile	Meinda	23542	4124 Central		1.50	IN.	37076		
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5. If the customer is new, you will need to create a new customer account by clicking on **"Add New"**.

4			Cus	tomer S	earch		
Last Name:		City:			Member #	_	
First Name:		State:		v	Membership		~
Phone:		Zipi			Constant of	Exact Name Match	2
Email:		Customer #				Search For Business	27.0
Records Per P	age: 20 🔹	Search				Disabled Customer	100
LastName	First Name	Customer #	Street 1	City	State	Zp	Parent Name
* indicates cu	slomer has orders		1 New				

6. Once you click **"Add New"** the **Quick Add Customer** box will show up where you will fill in the customer's information. Once you have captured all of the customer's information, click on **"OK"** 

3				Quick /	Add (	Custor	ner				
General	Question	n/Answ	er								
Bus	siness										
Prefix		First*	John	Middle	L		Last"	Smith		Suffix	
Email							Receive	email relate	d to Agile	Demo.	
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Biling	Address	xempt	Federal Tax ID				Stat	e Tax ID			
Count			United States				~				
Addre	ss 1*		1313 Mockingbird L	ane							
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**Note:** Everyone is a customer but not all customers are members.

7. Once you have selected a customer's account, select the **"Membership"** tab on the left side of the screen. Then you will need to select the membership program from the list underneath. This will allow you to see all the membership programs to choose from.

File View Action Ticket Printer Sales	Mode Support Functions Help
Sales Maintenance Point Of Sale	Clear Order Override Customer
Agile Theatre	🕦 🧞 Customer #: 23541
AMS - BoxOffice 🗸 🗸	Billing Address
Optional Customer Classification	Joe Agile
	4124 Central Pike
Catalon Depation Event Gift Card Membership Season	Hermitage, TN 37076
AT Membership (ATM)	Restricted Prices
Passes (pass)	Name
	Film Circle
	Flex Season
1	[] //mage 3

8. Choose the membership program on the right. When selling a membership, make sure your restricted prices is checked in order to see all pricing options.

Sales Maintenance Point Of S	ale Clear Order Override Custome
Agile Theatre AMS - BoxOffice Sptional Customer Classification Catalog Donation Event Gift Card	Customer #: 2354 Billing Address Joe Agile 4124 Central Pike
Membership Season AT Membership (ATM) Passes (fpass)	Hermitage, TN 37076

9. Select the membership price you want to sell to the customer. Then add the quantity of memberships the customer wants to purchase.

Sales Maintenance Point Of Sale	Clear Order Override Customer Member	Remove Contact Item List		6	
MS - BoxOffice				~	
Optional Customer Classification- v	Billing Address Joe Agile			Shipping Add Joe Agile	
stalog Donation Event Gift Card	- 4124 Central Pike			4124 Centra	2.045.95A
lembership Season	Hermitage, TN 37076			Hermitage,	TN 37076
	Restricted Prices				
AT Membership (ATM) vasses (fpass)	Name		Sales Line	Туре	
	Film Circle		Club		
	Membership Type (Level)	Membership Length	Price	Service Fee	Subtota
	Membership Type (Level)	Membership Length 12 Months	Price \$45.00	Service Fee \$0.00	Subtota \$45.00

**Note:** If you are adding a membership for the first time, make sure not to select a membership category with **renewal** in the price name.(See instructions on "How To Renew A Membership")

10. After selecting the membership type and quantity, click "**Proceed**" in the lower right corner.

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5 BuOfice - storal Castoner Classification	Start Date Thu . No 19 2015 (D+) Inve	visury Open	Y CALTere CRestand Proces	29 999 (0)				
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Sauch 🖲 🗐 📑				Express Sale		Add Proceed	> Pay >>	
Merch     Image: Control of the control of th								end; Par

11. A window will pop up asking you to assign the membership to the member's name. Click on the name for the account you are working on and then click **"OK"**.

Member # 575			
Joined Date Wedn	esday. February	25, 2015	
Expirating Date Mon	day , February	29, 2016	
Enabled			
Barcode (optional)			
Approved			
Notes			

**Note:** Some memberships allow more than one person to be assigned to it. Make sure to click the **plus** sign to add a second customer to those memberships that allow multiple members.

A Upda	ate Film Circle - Film Buff	×
Customers 🕂 💥 👕	₽ 🏖	
Name	Customer ID	
Jerry Smith	23705	
		(Image 7

12. The next screen is an **Item Summary** screen where you can review your order before processing a payment and finalizing an order.

Sales Maintenance Point Of Sale	Clear Order Override	Customer Member	Remove Co	22 ontact	Item List Pay	ment			
Agle Theatre 🗸 🗸	🕕 🐉 Custome	r #: 23541							
AMS - BoxOffice v	Billing Address						hipping Addres		
Optional Customer Classification- v	Joe Agile						oe Agile		
	- 4124 Central Pike					4	124 Central P	ike	
Catalog   Donation   Event   Gift Card   Membership   Season	Hermitage, TN 37076					ł	lermitage, TN	37076	
	対 item Summary								
AT Membership (ATM) Passes (pass)	Sales Line Type	Membership	Member #	Price	Service Fee	Delivery	Expires	Transaction	Fulfilled
rasses (pass)	5 Festival Pass	Special Access Pass							
	- Industry	Joe Agile	558	\$0.00	\$0.00		12 Months	37899	
	- Industry	Joe Agile	559	\$0.00	\$0.00		12 Months	37899	
	- Industry	Joe Agile	556	\$0.00	\$0.00		12 Months	37899	
	- Industry	Joe Agile	557	\$0.00	\$0.00		12 Months	37899	
	Sponsor	Joe Agile	560	\$0.00	\$0.00		12 Months	37099	

13. Once you confirmed everything on the **Item Summary** screen is correct, click **"Proceed"** in the lower right hand corner.

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14. The **Change Delivery Methods** window will pop up. Select the delivery method desired and then click **"OK"**.

A		Change Delivery Methods		
Desired Method Select For All:	Will Call - I	No Charge - \$0.00	ر آس	Show All
Deliverable Items Special Access F	Pass	Will Call - No Charge - \$0.00	0	¥
		Ì	OK	Cancel

15. On the payment screen select the payment method. (Example: Cash, MasterCard, Visa, Gift Card, etc.)

Sales Maintenance Point Of Sale	Clear Order Override	Customer Member Remove	Contac	t Item Li	st Payment Ri	efund
MS - BoxOffice		L 7 2000 L				
Optional Customer Classification-	Payment Information Amount 0.00	Summary Info Transaction Number:			i.	))
atalog Donation Event Gift Card Aembership Season Scratch Pad Order ⊡ 36168 - 1/14/15 6:01 PM 37786 - 1/14/15 6:01 PM	Cash ✓ (Choose Method) Cash Discover MasterCard Size Expiration Date (Mo.) ✓ (Year) ✓ Security Code	Cubichel Denvely (1999) Donations Tax: Total: Minimum Due:	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00			
rder #: 36168 (1) btotal: \$40.00 cket Fees: \$0.00 arvice Fees: \$0.00 elivery Fees: \$0.00 elivery Fees: \$0.00 protors: \$100.00 px: \$0.00 px: \$140.00 btotal: \$140.00				Payment Current B	Total: alance Due:	

**Note:** If you are using a POS station or have a USB Credit Card swipe attached to your terminal, you can swipe the credit card and all the credit card information will populate and automatically finalize the order.

16. Click **"Apply Payment"** to complete the order.

Amount 0.00 Cash v Document Number Card Holder Name Expiration Date (Mo.) v (Year) v Security Code	Transaction Number: Subtotal: Ticket Fees: Service Fees: Order Fees: Delivery Fees: Donations;	37899 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00			,l:
Document Number Card Holder Name Expiration Date (Mo.) V (Year) V	Ticket Fees: Service Fees: Order Fees: Delivery Fees: Donations:	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00			
Card Holder Name Expiration Date (Mo.) V (Year) V	Ticket Fees: Service Fees: Order Fees: Delivery Fees: Donations:	\$0.00 \$0.00 \$0.00 \$0.00			
Expiration Date (Mo.) V (Year) V	Service Fees: Order Fees: Delivery Fees: Donations:	\$0.00 \$0.00 \$0.00			
Expiration Date (Mo.) V (Year) V	Order Fees: Delivery Fees: Donations:	\$0.00 \$0.00			
(Mo.) ~ (Year) ~	Delivery Fees: Donations:	\$0.00			
(Mo.) V (Year) V	Donations:				
		\$0.00			
Security Code	Tax	\$0.00			
	Total:	\$0.00			
	Minimum Due:	\$0.00			
				nent Tota ent Balar	
Apply Payment Finalize	\$1 \$5 \$1	0 \$20	\$50	\$100	Exact Change

**Note:** If there is no balance due on the order or you are processing a comp membership type, then you will only need to click **"Finalize"** to complete the transaction.

17. Once the order has finalized, the **Order Confirmation** page will pop up.

				Agile Ticket	ting		
he order finali	zed correctly	10					
Ordert tems	Payments	Additional Info					
13	Customer #	23705					
Billing Addr	ess		Shipe	oing Address		Credit Info	
Jerry Smit			1000000	/ Smith		Credit Limit:	\$0.00
** No Info *	•		- No	o Info 🈁		Available Credit:	\$0.00
						Account Balance:	\$0.00
** No City	<sup></sup> , 99999		- No	City **, 99999		Deferred Balance:	\$0.00
Subtotal: Ticket Fees Service Fee Order Fees: Delivery Fee Donations: Tax: Order Total:	S: ES:		45.00 60.00 60.00 60.00 60.00 60.00 60.00 60.00 45.00				
] Hide this wi	ndow	View Aga	sin	Print Receipts	Print at Home	Order Confirmation	ОК

18. Click "Order Confirmation" to start the confirmation process.

and the second second second	[			1 million 10 million 1	
Hide this window	View Again	Print Receipts	Print at Home	Order Confirmation	OK

19. Once you click **Order Confirmation** the **Order Confirmation Options** box will pop up. Make sure the email address is correct, add any message you want to appear on the confirmation email and click **"Send Confirmation"** to email them their confirmation receipt.

riease cilo	use what you want to	do with this order confirm	nduon.
Send To:	noreply@agiletix.co	m	~
Message:	Thank you for your	membership order.	¢
			~
Open PDF	F Open Web	Send Confirmation	Close

(Image 15)